

Leadership Requirements and Guidelines

October 17, 2021 (V20211017)

Introduction

This document outlines the requirements and guidelines for anyone who wishes to lead or co-lead an activity for the AMC Southeastern Massachusetts (SEM) Chapter.

The chapter guidelines supplement the Appalachian Mountain Club's Leadership Requirements and Guidelines (effective January 2020 – 17th Edition) and the AMC's Code of Conduct.

Should anything in this document conflict with club-wide Leadership Requirements and Guidelines, the club-wide document will take precedence unless, for safety reasons, the SEM document is more restrictive, such as the SEM requirement for Wilderness First Aid (WFA) for backcountry trips.

The SEM Chapter Chair should be consulted, if needed, for interpretation of the SEM Chapter Leadership Guidelines.

General Requirements for All SEM Activity Leaders and Co-leaders

- Must be at least 18 years of age
- Must be a current member of the AMC (see note below)
- Must complete an AMC Leadership Training Workshop or have equivalent training and experience. The SEM Education Chair notifies the Activity Chairs which people have completed training and what their interests are
- Must demonstrate good technical skills in the activity they will be leading
- Must participate in at least two SEM chapter activities (with the committee in which the person wants to lead)
- Understand how to screen and register participants regarding their ability, experience, fitness, medical problems, and their equipment
- Know how to enter trips/activities into the AMC online trip system
- Comply with all AMC policy requirements regarding waiver forms, trip reports, etc.

Note: A leader is able to post an activity in the AMC Activity Database (ActDB) scheduled to occur after that leader's membership expires. However, AMC will cancel that activity unless the leader has renewed their membership at least two weeks before the activity date. AMC sends out various warnings to the leader, reviewers, and approvers before the activity is cancelled. For example, if a leader's membership

expires at the end of June, any activity posted in ActDB after June 15th will be cancelled if the leader has not renewed by June 15th.

Lapsed Leader Membership Notifications
 When the membership status of a leader is checked, each trip and leader combination is assigned a warning level, from 0 to 2, and the trip is assigned the same warning level as the highest level for its leaders. The notification process is demonstrated in the table below:

Notification Level	Time until Trip	Leader Membership Valid for Entire Trip?	Action
0	Any date	Yes	No notifications sent
1	3 weeks	No	Leader is issued a warning and asked to renew his/her membership ASAP. This notification is also sent to relevant approvers and committee chairs.
2	2 weeks	No	Trip is effectively cancelled. Notification is sent to the leader, relevant approvers, committee chairs and chapter chairs as well as to appropriate staff as designated in the Managing Chairs section described below.

When is a Leader/Second Leader/Co-leader Required?

A qualified leader is required on all chapter-sponsored activities, outings, or events with the exception of activities that are strictly social in nature (i.e., potluck dinners, picnics, barbecues, cocktail hours, slide shows, speaker presentations).

Refer to activity-specific leadership requirements for more information on second leaders / co-leaders.

Note that the Activity Chair, at their discretion, may require a second leader or co-leader for any event.

Inactive Leader

The Activity Chair may designate a leader who has not led at least two activities for the chapter within two calendar years as inactive. Inactive leaders cannot post trips but may request reinstatement through the Activity Chair and Chapter Chair. They may be required to re-qualify. Exceptions due to unusual circumstances will be considered.

Additional Guidelines

- Qualifying to lead one activity does not automatically qualify a leader to lead other activities. A leader must qualify for each activity they want to lead, e.g., cycling, paddling, hiking.
- The Activity Chair can grant and rescind leadership status.
- At the discretion of the Activity Chair and the Chapter Chair, a leader qualified to lead for another AMC chapter may be authorized to lead for the SEM Chapter.
- All AMC-sponsored events must be entered into the AMC activity database (ActDB) and be visible on the AMC website.
- The SEM Chapter’s Activity Chair and Chapter Chair (or their designees) must review all chapter events to ensure they support and are consistent with the Club’s and Chapter’s guidelines, traditions, principles, and mission.

- The Chapter Chair, working with the appropriate Activity Chairs, will resolve any judgment calls in the interpretation of the Leadership Guidelines in this document.
- In unusual circumstances, the SEM Board may make policy exceptions to this document.
- Any leaders that became leaders prior to this document being approved by the SEM Board are grandfathered in under the requirements that were in effect at the time they became leaders and do not need to retake any training or provide any additional documentation. Requirements to retain leadership status apply.

Activity-specific leadership requirements follow.

SEM Hiking and Backpacking Leadership Requirements

Becoming a Hike Leader

Note on Mentors

- Any SEM hike leader who has been an active leader for at least one year can serve as a mentor for an SEM member attempting to become a Level 1 Hike Leader.
- The mentors for a hike leader wishing to advance beyond Level 1 must be selected from a list of experienced SEM Hiking/Backpacking leaders approved by the Hiking Chair as mentors.

Note: Mentors provide feedback for the Leaders-In-Training during their co-leads and qualifying hike. Extended duration mentor/trainee relationships are not required or expected; new leaders should be encouraged to continue their learning by co-leading with many different experienced hike leaders.

Note on Co-Leads

The requirements specify the minimum number of co-leads required prior to the Leader-In-Training doing their qualifying hike. The actual number of co-leads will often be more if desired by the Leader-In-Training or as recommended by the mentors. An example of where additional co-leads may be recommended is someone wanting to advance to a Level 3 Hike Leader (i.e. a Winter Mountain Hike Leader), but the season's weather conditions did not provide for a winter experience on the chosen peaks.

Members do not need to have completed leadership training prior to co-leading hikes; however, for members wishing to become leaders, the last co-leads before the qualifying hike must be performed after leadership training has been completed. This is so the leader-in-training can co-lead these hikes within the context of the learnings from leadership training.

Level 1 Hike Leader

SEM Level 1 Hike Leaders lead four-season local day hikes in the Southeastern Massachusetts region and surrounding areas with modest elevation change, over easier terrain, and typically no more than ten miles in distance (e.g. Borderland State Park or Blue Hills). This includes local snowshoe trips.

Requirements

- Completed leadership training course provided by SEM (or equivalent course provided by another chapter)
- Attended at least three AMC hikes at any level as a participant and have completed leadership training prior to their official co-lead and qualifying hike.
- Co-lead: Works with Hike Leader (mentor) to plan the hike. Observes and assists leader.
- Qualifying hike: Plans a Level 1 hike including developing the route, screening participants, and all pre-hike communications. On the day of the hike, takes full charge of the hike including group management. Mentor observes and only takes over, if necessary, to ensure the safety of the group.
- Written recommendations from both the mentor on the qualifying hike and at least one other different mentor from the co-lead(s).

- Before posting a local winter activity, complete a Winter Hiking Workshop or watch a Winter Hiking Workshop video such as [this one](#) on the AMC Vimeo page.

Paths: AMC Member → Level 1 Hike Leader

Cape Hike Leader → Level 1 Hike Leader (See 'Additional Information')

Level 2 Hike Leader

Leads three-season day hikes over all types of terrain with significant elevation change miles, e.g., Mt. Greylock in MA, Mt. Monadnock in NH, or any 4,000-footer in the NH White Mountains, or very-long hikes e.g., 14-mile hike of the Blue Hills skyline (out and back)

Requirements

- Completed leadership training course provided by SEM (or equivalent course provided by another chapter)
- Attended at least three AMC hikes at any level as a participant prior to beginning their co-leads and final qualifying hike.
- Completed Wilderness First Aid (SOLO or AMC SEM-approved equivalent)
- Co-Leads - Works with Level 2 Hike Leader (mentor) to plan the hike. Observes and assists leader:
 - If are already a Level 1 hike Leader, require one co-lead in a Level 2 area.
 - If not already a Level 1 hike leader, require two co-leads of which one must be in a Level 2 area.
- Qualifying hike - Plans a Level 2 hike to the summit of one of the recognized 4,000-footers in the White Mountains, including developing the route, screening participants, and performing all pre-hike communications. On the day of the hike, takes full charge of the hike including group management. Mentor observes and only takes over, if necessary, to ensure the safety of the group.
- Written recommendation from the mentor on the qualifying hike and at least one other different mentor from the co-leads.

Paths: AMC Member → Level 1 Hike Leader → Level 2 Hike Leader

AMC Member → Level 2 Hike Leader

Level 3 Hike Leader

Leads winter day hikes, all types of terrain and distance, including all-terrain snowshoe hikes.

Requirements

- Must have led at least three Level 2 hikes in the past five years
- Must have participated in a Winter Hiking Workshop
- Must have completed Wilderness First Aid (SOLO or AMC SEM-approved equivalent)

- Co-Lead: Works with Level 3 Hike Leader (mentor) to plan a winter hike to the summit of one of the Massachusetts or New Hampshire mountains. Observes and assists leader
- Qualifying hike: Plans a Level 3 winter hike to the summit of one of the recognized AMC 4,000 footers in the White Mountains, including developing the route, screening participants and all pre-hike communications. On the day of the hike, takes full charge of the hike including group management. Mentor observes and only takes over, if necessary, to ensure the safety of the group. Note that summiting is not necessary if, due to safety concerns, the proper course of action is to stay below tree line.
- Written recommendation from the mentor on the qualifying hike and at least one other different mentor from the co-leads

Path: Level 2 Hike Leader → Level 3 Hike Leader

Note: Hike Leader levels build on one another. A Level 3 leader can also lead Level 2 and Level 1 hikes. A Level 2 leader can also lead Level 1 hikes.

Backpacking Leaders

A backpack is defined as a hiking or snow-shoeing trip that includes at least one backcountry overnight and possibly runs for multiple days and nights.

Note that SEM Backpacking Leaders are distinguished by ‘Class’ rather than ‘Level’ and that a leader can be both a Hike Leader and a Backpacking Leader. As an example, fictional leader John Smith may be both a Level 3 winter mountain day hike leader as well as a Class 1 three-season backpacking leader.

Class 1 Backpacking Leader

Leads three-season backpacks that include at least one backcountry overnight, all types of terrain.

Requirements:

- Led at least three Level 2 (or Level 3) hikes in the past five years.
- Co-Lead: Works with a backpacking leader (mentor) to plan the backpack. Observes and assists leader
- Qualifying backpack: Plans a Class 1 backpack including developing each day’s itinerary and route, screening participants, and all pre-hike communications. During the trip, takes full responsibility for group management, the day hikes, finding and treating water sources, selection of camping areas, ensuring group leaves no trace, and securing food from wildlife. Mentor observes and only takes over, if necessary, for safety of the group
- Written recommendation from mentor on qualifying backpack and at least one other mentor from co-leads

Paths: Level 2 Hike Leader → Level 3 Hike Leader → Class 1 Backpacking Leader
Level 2 Hike Leader → Class 1 Backpacking Leader

Class 2 Backpacking Leader

Leads Winter backpacks that include at least one wilderness overnight, all types of terrain.

Requirements

- Must have led at least three Level 3 winter hikes in the past five years.
- Must have led at least one Class 1 backpack in the past five years.
- Co-Lead: Works with a Class 2 backpacking leader (mentor) to plan the winter backpack. Observes and assists the leader.
- Qualifying backpack: Plans a Class 2 winter backpack including developing each day's itinerary and route, screening participants, and performing all pre-hike communications. During the trip, takes full responsibility for group management, the day hikes, finding and treating water sources, selecting camping areas, ensuring group leaves no trace, and securing food from wildlife. Mentor observes and only takes over, if necessary, for safety of the group.
- Written recommendation from mentor on qualifying hike and at least one other different mentor from co-leads.

Path: Level 3 Hike Leader + Class 1 Backpacking Leader → Class 2 Backpacking Leader

Additional Information

Descriptors

The following conversational descriptors can be associated with the various leader levels:

- Level 1 = Local Hike Leader
- Level 2 = Mountain Hike Leader
- Level 3 = Winter Mountain Hike Leader
- Class 1 = Backpacking Leader
- Class 2 = Winter backpacking Leader

Documentation

After the requirements for a desired class are satisfied, the candidate should submit an email to the Hiking Chair that lists their experience and the items satisfying the requirements and request to have the appropriate leader recommendations emailed to the Hiking Chair.

Hiking Chair Discretion

The Hiking Chair may accept equivalent training or life experience in replacement of both the SEM leadership training and co-leads. If the Hiking Chair exercises this equivalency, then the Hiking Chair must arrange a qualifying hike with one of the mentors at the candidate's leader level as a validation that the candidate's external experiences do indeed transfer over to AMC Leader expectations. If the mentor observing the qualifying hike has any reservations, then the candidate will be asked to follow the standard processes for becoming a SEM hike leader.

The Hiking Chair also has discretion to require additional training or co-leads prior to advancing a Leader-In-Training.

Cape Hike Leader Equivalent to Level 1 Hike Leader

Cape Hike Leaders are considered to have equivalent training to Level 1 Hike Leaders. A Cape Hike leader wishing to post and lead hikes off the Cape (including the Blue Hills) under 'Hiking' in ActDB will be assigned as a Level 1 Hike Leader. No additional training or co-leads are required. Similarly, a Level 1 Hike Leader wishing to post a Cape hike under 'Cape Hikes' in ActDB will be assigned as a Cape Hike Leader.

Activity Examples that Correspond to Different Leadership Levels and Classes

Level 1: Posted in May: A six-mile walk around Ponkapoag Pond in the Blue Hills. These are mostly flat trails.

Level 1: Posted in January: A four-mile snowshoe trip in Borderland State Park. These are mostly flat trails.

Level 2: Posted in June: Hike up Mt Greylock in western Massachusetts using the Gould Trail. Seven-mile round trip, 3,000 feet elevation gain.

Level 2: Posted in August: Last of the summer hiking series, a moderate 3.8 mile hike up to Carter Notch in NH. We will stay overnight at the AMC hut and then hike back down. Note: Overnight stays at an AMC hut are not considered backpacks.

Level 2: Posted in July: A twelve mile woodland hike in the Blue Hills. Expect to be on the trails for six to eight hours carrying a pack that can hold at least 64 oz of water.
Note: Even though this is a summer hike without much elevation gain, it still requires a Level 2 hike leader due to the extended distance involved. Being out on the trails for this long, especially during the summer, participants are more likely to suffer from hyperthermia (heat-related conditions), hypoglycemia (low blood sugar), or hyponatremia (low blood sodium).

Level 3: Posted in December: Winter Hike Series #3 – Hike Mt Pierce.

Class 1: Posted in June: Two-night, three-day 39-mile backpack on the AT from Culvers Gap to "The Pinwheel" viewpoint.

Class 2: Posted in January: Overnight winter backpack below tree line in the Berkshires.

Maintaining Leader Level Status

Level 2 & Level 3 Hike Leaders

WFA Refresher training: WFA must be retaken every two years, with a one-year grace period. Once you have completed WFA three times the grace period is extended to three years.

Lapsed WFA: If you let your WFA refreshers lapse you will temporarily revert to a Level 1 leader. Your prior leader status will be reinstated once you complete WFA. If you had a 3-year grace period, then the 3-year grace period is also reinstated.

Class 1 & Class 2 Backpacking Leaders

Maintain Underlying Hike Leadership Status

- You must keep your underlying Hike Leader status active. If your underlying Hike Leader status is lost, (e.g. you fail to maintain your WFA), then you also lose your backpacking leader status.
- For Class 1 backpacking leaders, their underlying hike leader status is a Level 2 Hike Leader and for Class 2 backpacking leaders their underlying hike leader status is a Level 3 Hike Leader.

Leading Hikes

When a Second Leader / Co-Leader is Required or Recommended

Activity	Second Leader	2nd Leader Level	Rationale
Level 1 Hiking (Local Hikes)	Optional	Level 1 Leader or AMC member training to be a Level 1 leader.	Second person is helpful if there is an incident or someone needs to be walked out. Emergency resources generally available within a reasonable timeframe.
Level 2 Hiking (3-Season Mountain Hikes)	Recommended	Level 1 Leader; Level 2 Leader highly recommended for above tree-line hikes	Second fully qualified leader is helpful if there is an incident. Group may be hours away from emergency resources.
Level 3 Hiking (Winter Mountain Hikes)	Required	Level 3 Leader or Level 2 Leader training to be a Level 3 leader.	Second fully qualified leader is useful if there is an incident. Second leader providing a second opinion on managing potential winter situations on the mountain (e.g. pending weather) can avert many difficulties. Group may be hours away from emergency resources.

Class 1 Backpacking (3-Season backpack trips)	Required	Level 1 Leader; Level 2 Leader if the backpack has significant elevation change or is mostly above tree-line; Class 1 Backpacking recommended	Second fully qualified leader is useful if there is an incident. Group may be days away from emergency resources.
Class 2 Backpacking (Winter backpack trips)	Required	Level 3 Leader or Class 1 Backpacking leader training to be a Class 2 Backpacking Leader; Class 2 Backpacking Leader recommended.	Second-fully qualified leader is useful if there is an incident. (See Level 3 Hiking rationale). Group may be days away from emergency resources.

Consult with the Hiking Chair should there be uncertainty as to what level co-leader is appropriate for a specific trip under consideration.

Unusual Hikes

If you plan a trip that does not naturally fall into one of the categories of trips assigned to the different leadership levels and classes, consult with the Hiking Chair. Unusual trips may be approved by the Hiking Chair if the trip plan addresses the risks associated with the trip.

Contact the SEM Hiking Chair at hikingchair@amcsem.org for additional details.

SEM Cape Hiking Leadership Requirements

Requirements for Level 1 Cape Hiking Leadership for hikes with easy to moderate terrain, generally no more than ten miles:

- Completed leadership training course provided by SEM (or equivalent course provided by another chapter)
- Two co-leads with written reviews and recommendations from the leader mentors who have been approved by the Cape Hiking Chair and/or Cape Hiking Vice Chair
- Works with leader mentor to plan first co-led hike. Takes full charge of the second hike including trip planning and group management
- First-aid training highly recommended
- A second leader or co-leader is optional; at the discretion of the primary leader. The leader should make the decision based on the size of the group and difficulty of the trip.

Contact the SEM Cape Hiking Chair at capehikingchair@amcsem.org for additional details.

SEM Bicycling Leadership Requirements

General Requirements

- Completed leadership training course provided by SEM (or equivalent course provided by another chapter)
- Have experience riding on the terrain leader proposes to lead (roads, bike trails, etc.)
- Two co-leads with written reviews and recommendations from the leader mentors who have been approved by the Biking Chair
- Totally plan and execute at least one ride with assistance of a current SEM bike ride leader (including preparing the listing for the AMC trip listing system)
- Takes full charge of the second cycle including trip planning and group management
- First aid training recommended

Day Trips (on road and off road)

- As of 2021, all SEM bike trips are day trips. If the Biking committee chooses to expand activities in the future, then the leader requirements will be revisited.
- Demonstrated knowledge of basic cycling safety and on-road or off-road rules (as applicable)
- Knowledge of basic bike maintenance
- Knows how to change a front and rear flat bicycle tube/tire
- Demonstrated knowledge of trip planning and navigation skills
- Knows how to use Ride with GPS or other navigation tool that the Cycling Chair (or Vice Chair) has decided to use
- A second leader or co-leader is optional; at the discretion of the primary leader. The leader should make the decision based on the size of the group and difficulty of the trip.

Contact the SEM Bicycling Chair at bikingchair@amcsem.org for additional details.

SEM Paddling Leadership Requirements

- Completed leadership training course provided by SEM (or equivalent course provided by another chapter)
- Be a participant on at least one SEM paddling activity before beginning co-leads
- Demonstrated paddling skills and basic water safety, rescue knowledge appropriate for the class of water. Describe rescue knowledge skills and scenarios.
- Perform two co-leads under the direction of a current active paddle leader. The first co-lead is under the direction of the leader and the second co-lead has the candidate perform all skills as if the candidate were the leader.
- A second leader or co-leader is optional; at the discretion of the primary leader. The leader should make the decision based on the size of the group and difficulty of the trip.
- The above requirements reflect that SEM Paddling is done in enclosed bays, sounds, rivers, and not open ocean. Paddles are generally within half mile of shore.

Contact the SEM Paddling Chair at paddlingchair@amcsem.org for additional details.

SEM Skiing Leadership Requirements

All Cross Country (XC) Ski Leaders must:

- Completed leadership training course provided by SEM (or equivalent course provided by another chapter)
- Know basic first aid, maintain CPR certification, and must have completed and maintain certification in SOLO Wilderness First Aid or AMC SEM-approved equivalent
- Have actively participated in and/or led winter hikes or snowshoeing activities
- Be an intermediate-level xc skier able to snowplow and maneuver curves
- Have co-led two xc ski trips with an approved leader
- A second leader or co-leader is optional; at the discretion of the primary leader. The leader should make the decision based on the size of the group and difficulty of the trip.
- SEM Skiing activities are generally in areas that are not far from assistance

Contact the SEM Skiing Chair at xskichair@amcsem.org for additional details.

SEM Trails Leadership Requirements

NOTE: AMC SEM Trail Work Activity Chair and Trail Work leaders will comply with the AMC Volunteer Trail Work/Trail Project Leader Requirements and Guidelines Shown Below (as approved by OLDC, May 2020).

Trail Work Trip Leaders will:

- Have appropriate leadership training as noted in the AMC Leader Requirements and Guidelines (LRG)
- Demonstrate ability to perform trail work, or work on trail-related structures that meets the recommendations outlined for a particular Skill Level, below
- Co-instruct on at least one work trip of a particular Skill Level before serving as a primary Leader for that Skill Level

LRG Safety Requirements for Trail Work Trip Leaders:

Trail work requires safety precautions beyond that of a recreational hike and use of appropriate Personal Protective Equipment (PPE). The Leader and Assistant Leader (if present) are required to determine the PPE or other equipment necessary for each project, and that it is used consistently and correctly by participants.

- Note: Participants who ignore PPE requirements should be dismissed from the project or assigned work that does not require the PPE.

Guidelines for Trail Work Trip Leaders:

In addition to any training required by sponsoring Club Units, Leaders should:

- Hold current certification in some type of basic first aid or better (WFA, WFR, Red Cross, etc.)
- Carry a first aid kit or kits appropriate for the size of the group and work being done
- Demonstrate the necessary technical skill that is appropriate for the level of activity that is being conducted. Specific skills will be determined by the appropriate Club Unit
- If appropriate, Leaders may engage subject matter experts or other qualified individuals to provide advanced skills that may be needed for specialized work projects
- Responsible to ensure that the tools and PPE for the project are in working condition and appropriate for the type of work. These may be provided by the chapter or participants will supply their own, provided they meet any required standards (typically ANSI or OSHA)
- Communicate the project's activity plan to all participants--who should be prescreened for the level of difficulty the activity requires. A "tailgate session" before departure for the work site will include tool use and operation, emergency communications, PPE use, and any other specific risks or safety concerns the terrain or project might entail. Many land managers have Job Hazard Analysis (JHA) documents that describe hazards specifically associated with many different aspects of trail work. If JHA's exist within the land-manager's organization, these should be used as part of this pre-work communication.

- Understand and conform to additional requirements Land Managers (State, Federal or private) may have for training, land use, equipment, and hazard communication.
- A second leader or co-leader is optional; at the discretion of the primary leader. The leader should make the decision based on the size of the group and difficulty of the trip.
- Below is a template of recommended skill levels for Trail Work Trip Leaders-in addition to the requirements in the AMC Leader Requirements and Guidelines (LRG).

Guidelines for Skill Levels of Volunteer Trail Work:

Club Units are responsible for defining and assessing the skill level of Leaders. This list is not intended to be all encompassing.

BASIC:

Basic maintaining work with hand tools and includes clipping, blazing, raking, widening, weeding, clearing water bars, removing trash, small downed limbs or trees, etc.

INTERMEDIATE:

Work generally involves construction of new (or repair of existing) trail features such as water bars, step stones, bog bridges, etc. Trained/Experienced Leader or subject matter expert must be present to lead more complicated trail improvement projects such as water bar construction, bog bridge installation, treadway re-grading, etc. This level does not include work that requires grip hoist or other overhead rigging. May serve as an instructor for Basic level leaders.

ADVANCED:

In addition to Basic, a Trained/Experienced Leader can lead projects such as trail relocation, new trail construction, construction/repair of bridges and other trail structures. May serve as an instructor for Basic and Intermediate leaders.

Note on Sawyers and Swampers:

- Sawyers and Swampers using chainsaws under the AMC umbrella have specific requirements and certifications: (<http://www.outdoors.org/pdf/upload/AMC-20Chainsaw-20Policy.pdf>). A work party leader does not need certification to lead the project, but only qualified sawyers may use chainsaws.
- For large projects likely require consultation with land-managing organization - Consult with AMC Trails Staff.

Contact the SEM Trails Chair at trailschair@amcsem.org for additional details.

DS 10/17/2021